

Potential Change Order Creation

What are Potential Change Orders?

A Potential Change Order (PCO) identifies cost exposure on a project. It could be the result of an RFI with a cost impact, a request for change from a contractor, a claim from a contractor, a log of future options, etc. User can attach supporting documentation to a PCO. The potential change order is routed via workflow to gather additional backup information, and, when approved, can be merged into a change order with no additional data entry.

Potential Change Orders will appear on the ACR in the "Reservations" column. Line items from approved PCO's can then be processed into Contract Modifications to prevent duplicate data entry.

Who Will Use This?

Construction Manager Project Manager

Steps to Create a Potential Change Order

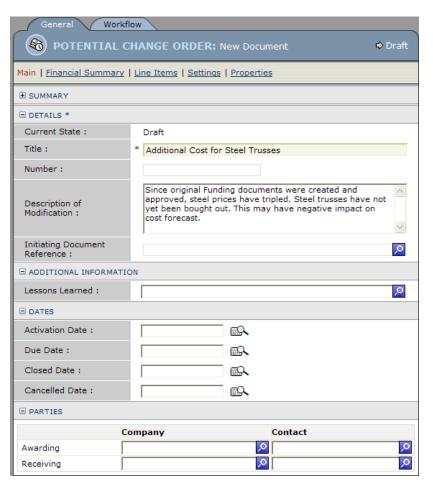
- 1. Log into ePM as a user with the PCO Creator security role, then navigate to the appropriate project.
- Navigate to the PCO register by clicking on Application > Contract Management > Change Control > PCOs. The Potential Change Order register displays.







3. Click the 'New' button and a blank PCO document displays.



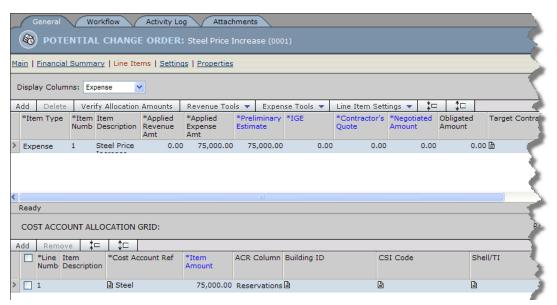
On the 'Main' page, enter at least a Title and description.

In the 'Dates' section, all but the 'Due Date' field will autopopulate based on workflow.

Fields in the 'Parties' section are optional.



4. On the 'Line Items' page, first make sure the 'Display Columns' field displays 'Expense'.



Then in the upper grid, enter an 'Item Description' and an amount in the 'Preliminary Estimate' field. Whereas in a Contract or Modification, where a single dollar amount is entered per line item and then the document is processed through its workflow, a PCO, once set to 'Active', can accommodate multiple dollar amounts. As the initial 'Preliminary Estimate' becomes more accurate, the more refined amounts can be entered in the 'IGE', 'Contractor's Quote', and 'Negotiated Amount' fields respectively. For reporting purposes, ePM always uses the value in the right-most of these four fields.

User can also select a Contract reference for this PCO, if it is known.

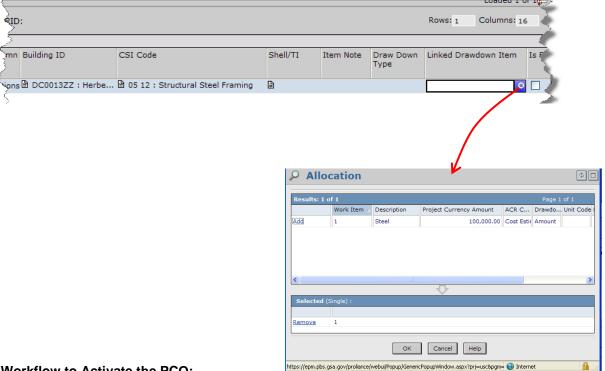
Note: The PCO grid is different than that of a Contract or Contract Modification. The Cost Account Allocation is not shown as a 'child' (like in the Contract and Mod), but rather it appears in a separate grid below the line item. If multiple PCO line items are created, the Cost Account Allocation grid only shows the allocation for the line item that is selected in the upper grid.

In the lower grid, select the appropriate allocation by clicking the lookup icon in the 'Cost Account Ref' field. From the applicable lookup, select a 'Building ID', 'CSI Code', and 'Shell/TI'. Also select a 'Linked Drawdown Item'.





The 'Linked Drawdown Item' field links back to the Cost Account selected for each PCO line item, and ensures that project forecast costs are properly reduced should a PCO eventually become a Contract Modification.

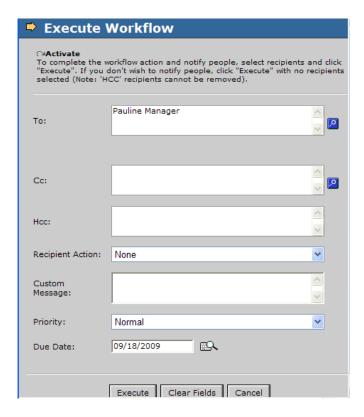


Execute Workflow to Activate the PCO:

5. Click the arrow next to the 'Workflow' button found at the top of the screen, and select 'Activate'. An 'Execute Workflow' dialog box displays, showing who will receive a notice to approve the document (the 'To' box), who will be copied (the 'Cc' box), what action the recipient should take, the message the recipient will see when notified, the priority of this process, and the date the subsequent action is due. These fields are editable- additional users can be notified or copied, the custom message, priority and due date can be changed



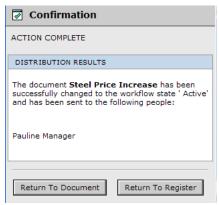








8. Click 'Execute'. If successful, ePM displays an 'Action Complete' message showing to whom notification has been sent. User has the choice of returning to the PCO Document itself or to the Register which shows all PCO documents on this project.



Create a Contract Modification from an Active Potential Change Order:

9. Open an Active Potential Change Order. On the 'Line Items' page, click the 'Expense Tools' button and select 'Hand off to New Contract Modification'.



Click 'Yes' when prompted to Save.





10. A wizard launches to walk the user through the process. The first step is to select a Contract with which ePM will associate the resulting Mod.



Note: the first radio button shows a subset of all contracts, filtered to display only those selected as reference contracts (shown in step 4 above). The second radio button would show all contracts.

11. Clicking the lookup button opens a box showing available contracts. Select one, then click 'OK'.



Then, back on the wizard step 1 screen, click 'Next'.





12. In step 2 of the wizard, click the 'Add/Remove' button.



13. Select one, multiple, or all Line Items from the picklist, then click 'OK'.

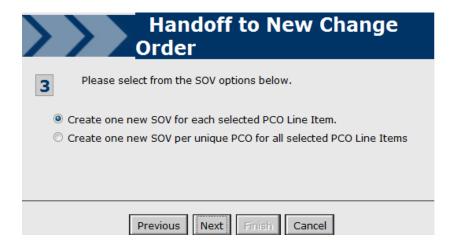


ePM goes back to step 2 of the wizard, and shows the line item(s) selected. Click 'Next'.

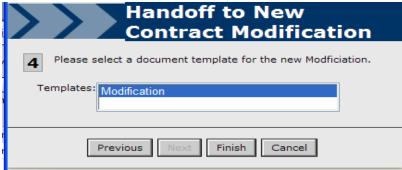




14. In Step 3 of the wizard, choose whether the Contract Modification will have separate line items for each of the PCO line items imported or it will combine all the PCO lines items into a single line item on the Contract Modification.



- 15. Click Next
- 16. Step 4 of the wizard displays the template that will be used to create the new Contract Mod.

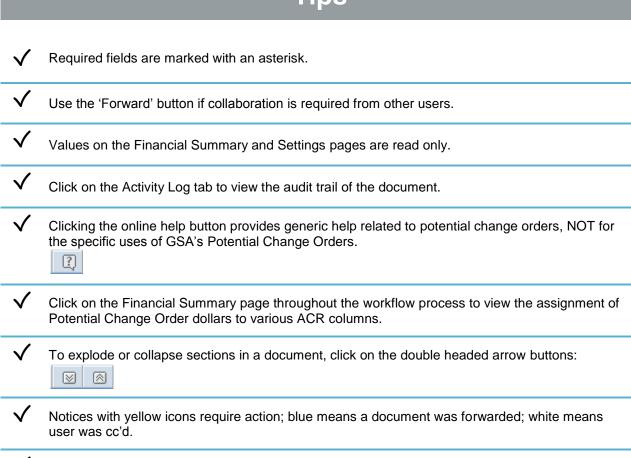


17. Click 'Finish'. ePM creates the new Contract Modification, using the Title from the PCO. The Schedule of Values page has autofilled line items that were imported from the PCO.

GPM



Tips



For additional help and support, contact the ePM Regional Point of Contact: